GCWORKPLACE FUNCTIONAL PROGRAMMING '101' GUIDE

IN THIS GUIDE YOU WILL FIND:

PART 1: KEY CONCEPTS & DEFINITIONS

INTRODUCTION

The functional program is a document prepared prior to a workplace fit-up project which outlines in detail the functional and technical requirements of the workspace so that it may be designed to meet the specific needs and work styles of those who will be occupying the space. The Functional Program Report is the culmination of the results of a design consultation process, and may also include other client-specific information that would inform the design process, such as more detailed Special Purpose Space specifications, departmental planning guidelines or security briefs. The importance of following a rigorous design consultation process cannot be understated, as user requirements and activities form the basis of each GCworkplace design. For this reason, all functional programming activities must include the three-phased consultation approach outlined in this document, as well as the corresponding tools and templates.

DEFINITIONS OF KEY TERMS:

Activity-Based Working: a mobile and digitally-enabled way of working that allows employees to untether from a fixed workpoint and choose a work setting that best suits their various tasks and preferences.

Workpoint: any space where an employee can perform their work, with the support of mobile technology and wireless network access. Includes both individual and collaborative settings in open or enclosed configurations to support a variety of tasks and varying degrees of interaction or concentration.

Special Purpose Space: a non-standard or "non-recurring" space (area not typically found in all offices) which is required by a department to accommodate activities that are unique and essential to the delivery of departmental programs.

Internal Mobility: the average frequency that employees in an organization change between various tasks and activities throughout a typical day, and the associated patterns of movement throughout the workplace.

External Mobility: the average frequency that employees in an organization perform work outside of the workplace, including telework, field work, external meetings, or the use of alternate work sites.

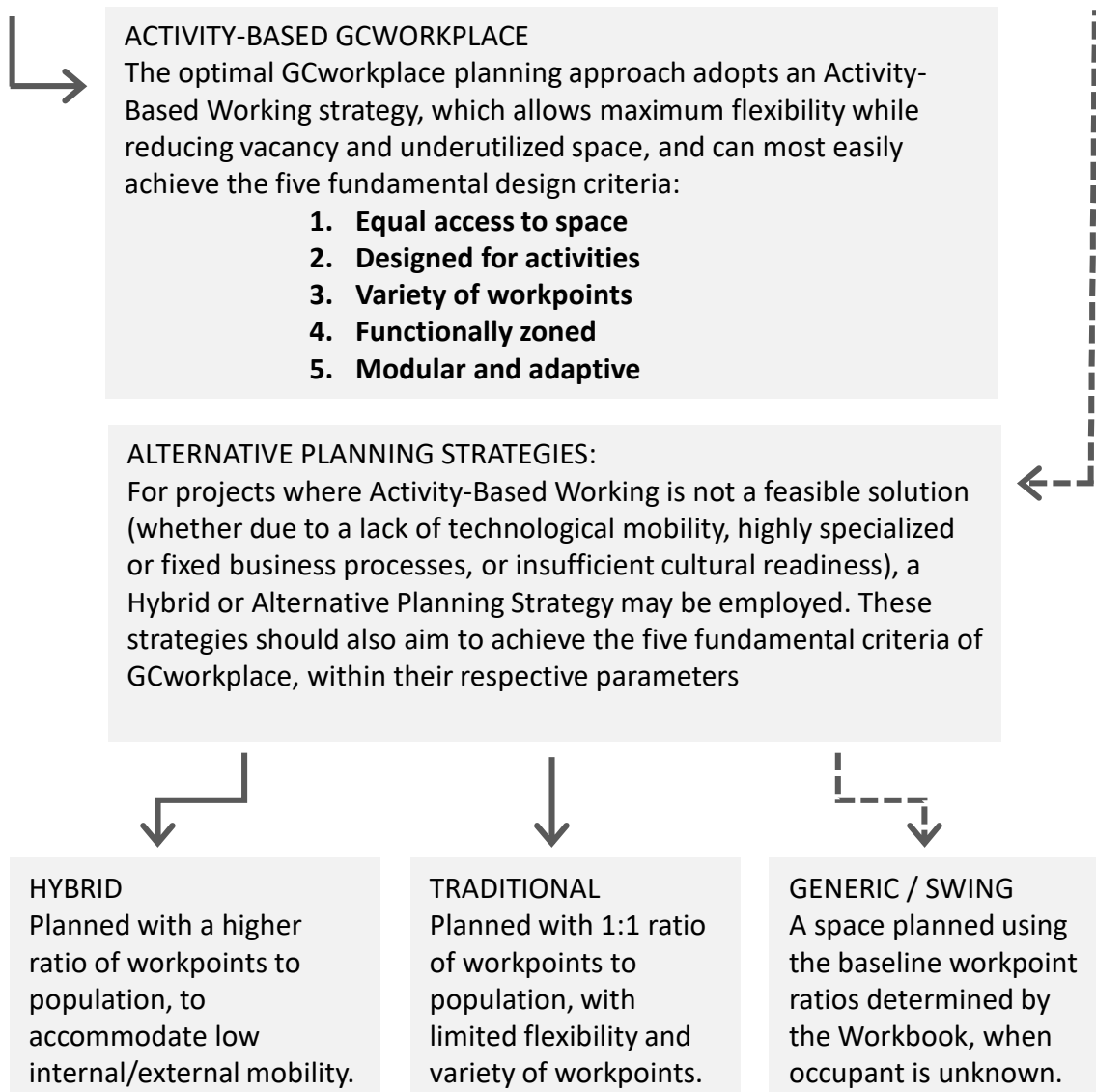**Space Utilization:** the average rate at which workpoints are occupied in a typical day.

Generic or Swing Space: a space designed without a specific end user determined, for the purposes of temporary accommodations. As functional program is not possible, planning is instead based solely on a baseline calculation done using the GCworkplace Space Planning Workbook.

PART 1: KEY CONCEPTS & DEFINITIONS

USER-CENTERED DESIGN

User centred design puts a greater emphasis on the functional needs and work styles of workplace occupants to create an environment that caters to their unique activities and business processes, offers individual choice and flexibility, and empowers a more autonomous way of working whereby employees have greater control of the factors and settings that most contribute to their individual and group productivity.
This means it is essential to engage with end users to inform the design solution.

ACTIVITY-BASED GCWORKPLACE
The optimal GCworkplace planning approach adopts an Activity-Based Working strategy, which allows maximum flexibility while reducing vacancy and underutilized space, and can most easily achieve the five fundamental design criteria:
1. **Equal access to space**
2. **Designed for activities**
3. **Variety of workpoints**
4. **Functionally zoned**
5. **Modular and adaptive**

ALTERNATIVE PLANNING STRATEGIES:
For projects where Activity-Based Working is not a feasible solution (whether due to a lack of technological mobility, highly specialized or fixed business processes, or insufficient cultural readiness), a Hybrid or Alternative Planning Strategy may be employed. These strategies should also aim to achieve the five fundamental criteria of GCworkplace, within their respective parameters

HYBRID
Planned with a higher ratio of workpoints to population, to accommodate low internal/external mobility.

TRADITIONAL
Planned with 1:1 ratio of workpoints to population, with limited flexibility and variety of workpoints.

GENERIC / SWING
A space planned using the baseline workpoint ratios determined by the Workbook, when occupant is unknown.

ACTIVITY PROFILES

The GCworkplace Activity Profiles provide three models for workpoint distributions based on three different profiles of employee interaction. These profiles demonstrate how the GCworkplace design concept can be adapted to different types of organizations based on their unique types of activities performed in the workplace, typical duration and frequency of these activities, patterns of interaction within and among teams, and overall functional and technical requirements. The Activity Profiles take into account varying levels of mobility within the workplace, as well as mobility between the workplace and alternate work locations.

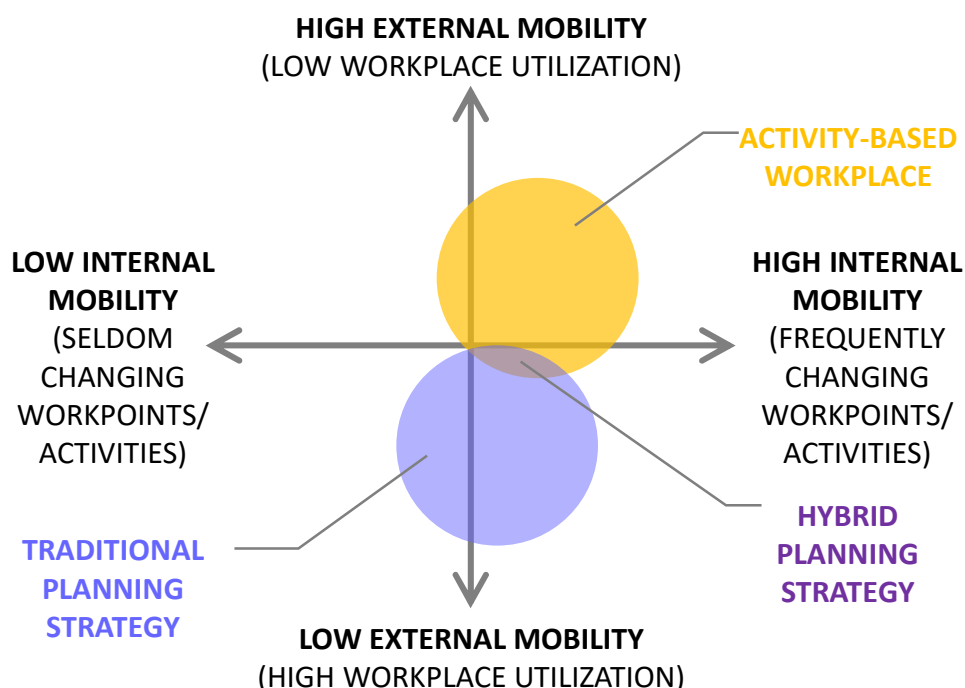| **AUTONOMOUS**	**BALANCED**	**INTERACTIVE**
The Autonomous profile is best suited to organizations with limited interaction among colleagues or teams, and features the highest proportion of individual workpoints.	The Balanced profile is best suited to organizations with moderate interaction, mostly within teams. It has the most balanced distribution of workpoints, with an equal proportion of individual and collaborative workpoints.	The Interactive profile is best suited to organizations with a high degree of interaction between colleagues and among teams. It features the highest proportion of collaborative workpoints

MOBILITY ASSESSMENT

An important part of the consultation regarding activity profiles should include a discussion of internal and external mobility. Internal mobility, that is, moving between multiple activities and workpoints within the workplace frequently throughout the day, will determine whether a design solution should lean more towards an Autonomous or Interactive profile. However, external mobility, referring to activities being performed outside of the primary workplace (whether telework, field work, external meetings, or through the use of coworking or alternate work sites) may also affect the recommended activity profile for the primary workplace design by altering the type of workpoints required. It is therefore essential to determine mobility level, and what types of activities are being performed within or outside the workplace, in order to determine the optimal planning approach.

The following chart illustrates how mobility influences which planning strategy is employed:

HIGH EXTERNAL MOBILITY
(LOW WORKPLACE UTILIZATION)

ACTIVITY-BASED WORKPLACE

LOW INTERNAL MOBILITY
(SELDOM CHANGING WORKPOINTS/ ACTIVITIES)

HIGH INTERNAL MOBILITY
(FREQUENTLY CHANGING WORKPOINTS/ ACTIVITIES)

HYBRID PLANNING STRATEGY

TRADITIONAL PLANNING STRATEGY

LOW EXTERNAL MOBILITY
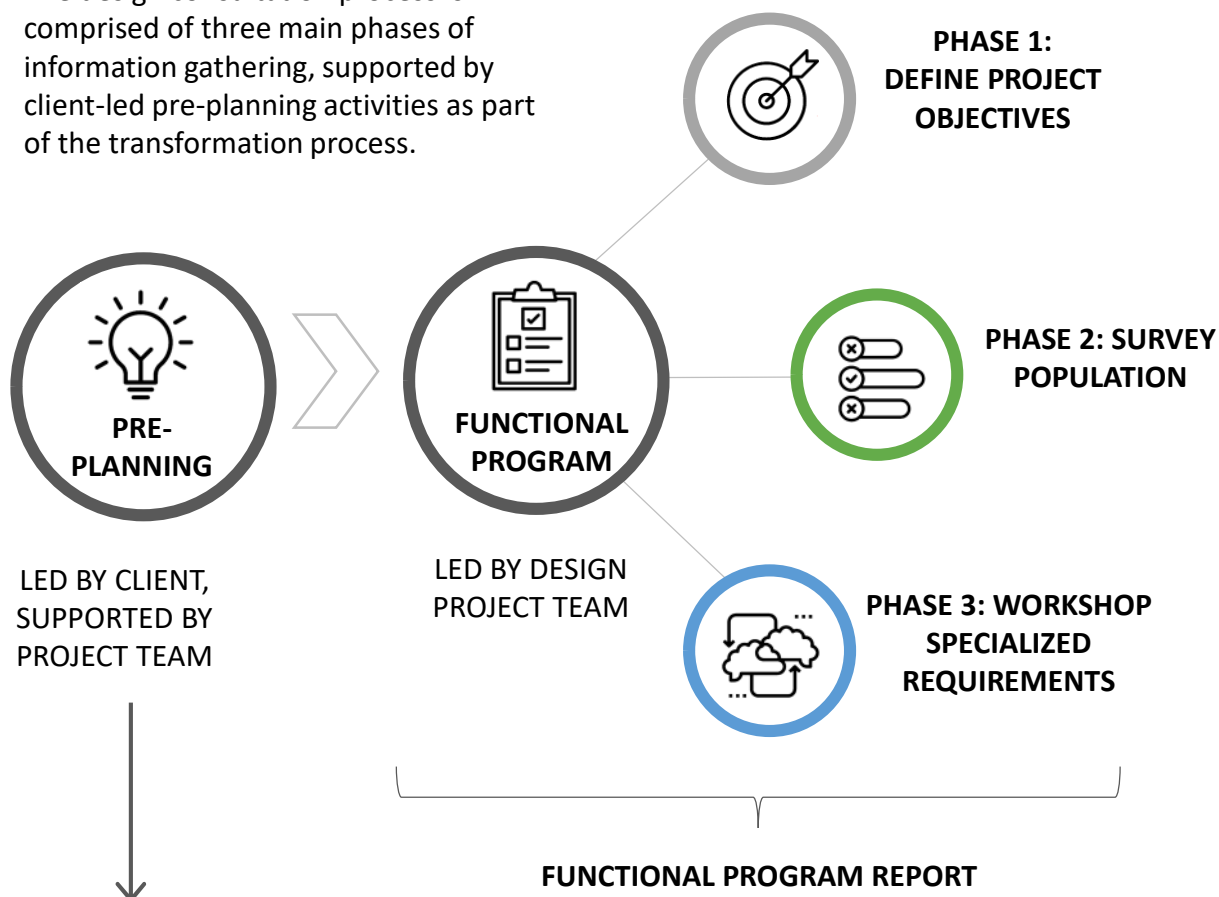(HIGH WORKPLACE UTILIZATION)

Candidates for an Activity-Based planning strategy have the mobile technology and digital processes in place and therefore exhibit moderate to high internal and/or external mobility. Activity-Based planning can be employed in cases where external mobility is lower, by using an Activity Profile with a greater ratio of workpoints to population.

Candidates for a Hybrid planning strategy may have some of the capability to work in a mobile way within the workplace, but have limited external mobility requiring a higher proportion of individual workpoints (up to a 1:1 ratio). Internal mobility should still be assessed to determine which Activity Profile is most appropriate given the nature and frequency of their internal activities. Smaller populations (25 or less) may also benefit from a Hybrid planning approach, if space utilization rates are higher and therefore require a 1:1 ratio of individual workpoints.

Candidates for a Traditional planning strategy will typically include those organizations who have very specific or specialized business processes that are not conducive to internal or external mobility and have functional requirements that are strongly fixed in the physical workplace. In these cases, individual workpoints are planned at a 1:1 ratio to population and may be dedicated to specific functions where required.

PART 2: DESIGN CONSULTATION STEP-BY-STEP

The design consultation process is comprised of three main phases of information gathering, supported by client-led pre-planning activities as part of the transformation process.

PHASE 1: DEFINE PROJECT OBJECTIVES

PRE-PLANNING

FUNCTIONAL PROGRAM

PHASE 2: SURVEY POPULATION

LED BY CLIENT, SUPPORTED BY PROJECT TEAM

LED BY DESIGN PROJECT TEAM

PHASE 3: WORKSHOP SPECIALIZED REQUIREMENTS

FUNCTIONAL PROGRAM REPORT

PRE-PLANNING ACTIVITIES
The following activities can help prepare both client organization and project team to embark on a successful design consultation process:

DEFINE A VISION: Examine strategic business plan and identify organizational vision and goals that will drive the project; draft a vision statement
TRACK ACTIVITIES: Begin documenting key business processes and unique activities
ASSESS SPACE UTILIZATION: Establish a baseline utilization rate of existing space
COMMUNICATE: Build a narrative to engage employees at all levels of the organization
ASSEMBLE CHAMPIONS AND KEY PROJECT STAKEHOLDERS: Identify leadership champions to support change management and communication strategy, and begin to identify key project stakeholders such as functional group leads from each business unit, as well as IM/IT, security, facilities, OHS

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PHASE 1: ESTABLISH A VISION

PURPOSE
The first step is to define a project-specific vision, and any key objectives. What would a successful project outcome look like? What is the desired workplace experience, and how does it support the organizational vision?

PROCESS

- An initial workshop is held to discuss the opportunities and challenges presented by GCworkplace with the goal of establishing an organizational workplace strategy that includes a clear vision statement and key performance indicators
- Depending on project scope, this could be an informal meeting with the project team or a more structured interactive session
- An assessment of internal and external mobility and readiness for Activity-Based working should be discussed with the team
- The desired outcome would identify organizational drivers for workplace design, as well as potential challenges or resistance points so that they can be better addressed through development of the design and planning strategy

PHASE 2: SURVEY POPULATION

PURPOSE
Once the overall vision has been established, it is important to survey the entire population who will be affected by the workplace modernization, in order to establish baseline data regarding individual functional requirements, activities being performed, typical patterns of interaction and mobility, and general work styles and preferences of the surveyed population.

PROCESS
- Project team requests that an electronic survey be set up by sending an email with the following information to the GCworkplace Mailbox:
  - Client organization name, unabbreviated, in English and French
  - Address of project, if available
  - Approximate total FTE population number
- A unique survey link for the project is created by Workplace Solutions
- The PSPC Design Manager or Accommodation Professional is then responsible for inputting the Branches and, where required, Divisions/Groups into the survey via the Qualtrics account
- Survey test link is sent to client and project team for approval

PHASE 2: SURVEY POPULATION

PROCESS (continued from previous page)
- The survey is then sent to all employees in the client organization who are part of the project
    - General timelines, methodology
    - Importance of communication
- This will help to determine functional needs at each workpoint, inform a zoning strategy for floor(s), and propose an appropriate activity profile based on ratios of individual and group activities
- Once survey is closed, data is exported by PSPC DM/Accomm for analysis and reporting by consultant (survey report template available)
- The results of the survey are then analysed by the Consultant and supported by DM/IDNCOE (depending on regional team structure/protocol), and a preliminary report is prepared for discussion in Phase 3
    - How is this done
    - Tools available

PHASE 3: GATHER PROGRAM-SPECIFIC REQUIREMENTS

PURPOSE

Once the baseline data has been collected, it is necessary to dive deeper with the functional group representatives and project stakeholders identified in Phase 1. For example, information relating to Special Purpose Spaces or particular IT or security requirements would be captured in these workshops.

PROCESS

- To do this effectively, an interactive workshop format is best – more than one may be required depending on the project scope, and additional interviews may be held with functional groups at the discretion of the design professionals
- At this point, a clear list of project stakeholders should have been determined – this would include any functional representatives such as branch/division heads who will be required to provide detailed program-specific requirements, as well as representatives from IT, security, facilities, and OHS or HR if there are any Duty to Accommodate requirements
- Workshop templates for both general office and SPS are available, as well as a Facilitator Guide for each, to support design professionals in carrying out this phase

FINAL REPORT:

After all three phases of consultation are complete, a final functional program report is prepared to reflect the data analysis and recommendations for workplace design. A document template is available to provide an outline of suggested components, though the final report may vary based on project scope.

SAMPLE FUNCTIONAL PROGRAM REPORT OUTLINE:

Project Background
        Organizational mandate, structure, projected growth
        Space allocation (per SAS)
        Future space solution (if applicable)
Programming Methodology
Vision Statement and Key Project Objectives
Survey Results and Analysis
        Recommended Activity profile
        Mobility Assessment
        General workspace findings
        Individual workpoint findings
        Collaborative workpoint findings
        Support space findings
        Storage findings
        Technology
Design recommendations
        General Administrative Office Requirements
        Office space recommendations
        Special Purpose Space Requirements
Planning and Design Strategies
        Functional adjacencies and proximity recommendations
        Zoning strategy
        Stacking strategy (if applicable)
Workpoint Data Sheets